

TO: POTENTIAL PROPOSERS

FROM: Administrative Office of the Courts (AOC) of the State of California
Executive Office Programs & Information Services Divisions

DATE: December 10, 2008

SUBJECT - PURPOSE OF MEMO: Request for Proposals (RFP)
The AOC seeks a qualified vendor to provide Web Content Management implementation and migration services in support of the redesign of Judicial Branch Web sites.

ACTION REQUIRED: You are invited to review and respond to the attached Request for Proposal ("RFP") as posted at <http://www.courtinfo.ca.gov/reference/rfp/>:
Project Title:
Web Redesign Implementation and Migration Services

RFP Number: EOP2008RCS-CT

SOLICITATIONS MAILBOX: solicitations@jud.ca.gov

DUE DATE & TIME FOR SUBMITTAL OF QUESTIONS: Deadline for submittal of questions pertaining to solicitation document is: **1:00 p.m. (Pacific Time) on December 18, 2008**

PROPOSAL DUE DATE AND TIME: Proposals must be received by **3:00 p.m. (Pacific Time) on January 15, 2009**

SUBMISSION OF PROPOSAL: Proposals should be sent to:
Judicial Council of California
Administrative Office of the Courts
Attn: Nadine McFadden
RFP No. EOP2008RCS-CT
455 Golden Gate Avenue
San Francisco, CA 94102

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1.0 Introduction

- 1.1 As the staff agency to the Judicial Council of California, the Administrative Office of the Courts (AOC) is issuing this RFP process to select a qualified vendor to provide consulting services for implementation of a new Web Content Management System (CMS) and subsequent migration of all existing Web content into the new CMS, all in support of a concurrent Web Redesign initiative.
- 1.2 The AOC has acquired the RedDot CMS and RedDot Live Server to support its Web content management needs. The vendor must have a proven track-record of accomplishment in deploying large, complex Web sites on a content management system; preferably with specific RedDot and RedDot Live Server experience.
- 1.3 The vendor shall assume that all software and hardware required for development and deployment of the redesigned Web sites has been or will be procured by the AOC outside of this solicitation.
- 1.4 The firm target date for re-launching of our redesigned sites is September, 2009.
- 1.5 The AOC is seeking a rapid-deployment CMS implementation and migration partner to provide expertise and services in the following areas.
(Note: Vendors are instructed to review and respond to the complete Scope of Work detailed in Attachment 5.)

1.5.1 Implementation Strategy and Approach Services

Implementation Strategy and Approach Services are the activities and deliverables associated with developing and refining the strategy, approach, and methodology that will be used for implementation of our site redesign on the RedDot platform.

1.5.2 Content Migration Services

Content Migration Services are the activities and deliverables associated with migration of all Web content from our existing sites to the redesigned site on the RedDot CMS Platform.

1.5.3 Project Management and Initiation Services

Project Management and Initiation Services are the activities and deliverables associated with establishing a framework for ongoing management and control of the project tasks and schedule.

1.5.4 Content Preparation Services

Content Preparation Services are the activities and deliverables associated with preparation of content for both content migration and management in the CMS, including development of a site taxonomy and metadata scheme. This includes all aspects of content management and migration processes and policies.

1.5.5 System Design and Specification Services

System Design and Specification Services are the activities and deliverables associated with documenting system requirements in preparation for configuration and development activities.

1.5.6 System Installation Services

System Installation Services are the activities and deliverables associated with installation of both physical hardware infrastructure and software on the development, staging and production environments. This includes required planning and interaction with the California Courts Technology Center (CCTC).

1.5.7 System Configuration and Development Services

System Configuration and Development Services are the activities and deliverables associated with the configuration, development, customization and integration activities required to bring the system into alignment with the documented requirements and specifications.

1.5.8 Testing Services

Testing Services are the activities and deliverables associated with testing and subsequent acceptance of the system configuration and development deliverables.

1.5.9 Documentation and Training Services

Documentation and Training Services are services associated with preparation of Stakeholders for ongoing management and use of the RedDot CMS.

1.5.10 Deployment Services

Deployment Services are services activities associated with successful deployment of the Web site to the staging and production environments.

1.5.11 Knowledge Transfer and Training Services

Knowledge Transfer and Training Services are services associated with transfer of knowledge from Vendor staff to AOC staff to enable ongoing management of the deployed sites by the AOC.

End of Section 1.0

2.0 Issuing Body

- 2.1 The Administrative Office of the Courts (AOC) is issuing this RFP in support of the Judicial Branch, including the Judicial Council, and the Courts.
- 2.2 The Judicial Council of California, chaired by the Chief Justice of California, is the chief policy making agency of the State's judicial system. The California Constitution directs the Council to improve the administration of justice by surveying judicial business, recommending improvements to the Courts, and making recommendations annually to the Governor and the Legislature. The Council also adopts rules for Court administration, practice, and procedure, and performs other functions prescribed by law. The AOC is the staff agency for the Council and assists both the council and its chair in performing their duties.

End of Section 2.0

3.0 AOC Overview

- 3.1 The AOC is the staff agency of the Judicial Council of the State of California Court system. Established in 1961, the agency is headquartered in San Francisco and maintains three regional offices and an Office of Governmental Affairs in Sacramento.
- 3.2 Under the direction of the Chief Justice and the Judicial Council, the AOC serves the trial Courts for the benefit of all Californians by advancing excellence, leadership, and service in the administration of justice. The AOC is responsible for a number of Judicial Branch programs and services to improve access to a fair and impartial judicial system in the State of California. It provides statewide support to the Courts in the fields of information technology, personnel, finance, legal, research, and purchasing.
- 3.3 The AOC is organized according to functional responsibilities that are based on judicial administration and Court operations areas. The AOC is organized into nine divisions in San Francisco, three regional offices, and employs a staff of more than 750.

End of Section 3.0

4.0 Redesign Project Background

- 4.1 In 2007, the AOC entered into a contract with a Web design firm to redesign its Web sites to standardize the overall look and feel of its existing sites, improve access to information, and support task- and audience-based navigation. The Web design firm is in the process of delivering an integrated information architecture; a content segmentation plan for authenticated users, and a set of standardized html templates based on the new graphic design system. For more information on this project, please reference RFP#EOP-0307-RB, found here: <http://www.courtinfo.ca.gov/reference/rfp/Webredesign-rfp.htm>
- 4.2 To ensure the scalability and long-term success of this endeavor, the AOC acquired the RedDot CMS to automate and streamline the management of our Web assets. The AOC will leverage the RedDot solution to improve content creation processes, enable content reuse and segmentation, and implement a distributed publishing methodology.
- 4.3 The Web Redesign Implementation and Migration project team will implement the design delivered by the AOC's redesign contractor into the RedDot CMS. This effort will require detailed content and process analysis to successfully migrate disparate existing sites into a consolidated information architecture.
- 4.4 The current redesign merges sites currently managed as distinct Web presences into a single site, using a roles-based delivery model to present content to targeted users. As conceived, the site has two primary states: a non-logged in state for the public (no password required), and a logged-in state (password required) for the internal (secure) portion of the site. Implementation of this site paradigm will require development of an agency wide taxonomy and a set of metadata to support content segmentation, targeting, reuse, and security.
- 4.5 The AOC anticipates investing between \$500,000 and \$550,000 on consulting services to successfully achieve our CMS implementation and migration goals, outlined in more detail in this RFP.

End of Section 4.0

5.0 Overall Objectives for Modernizing Our Web Communications System

- 5.1 In 2006, the AOC began a long-term project to modernize its Web communications infrastructure, beginning with a Web Assessment. In June 2007, the Judicial Branch Web Redesign Project was initiated with the aim of consolidating our fragmented Web communications system into one, cohesive and scalable model, supported by a Web content management system.
- 5.2 In 2008, the AOC selected the RedDot CMS to help de-centralize our web publishing process and streamline our agency's ability to post and maintain up-to-date information.
- 5.3 The AOC is now seeking a CMS implementation and migration services contractual relationship with a qualified vendor that will assist the AOC in realizing this vision, using the RedDot CMS.
- 5.4 A summary of our goals and objectives is provided below in order to help potential vendors gain more specific insight to the over-arching goals that we have set for modernizing our Web communications apparatus.

Goals	Measurable Objectives
Expand control of Web content through the use of enterprise-scale content management tools, functionality, and best practices	<ul style="list-style-type: none"> 1. Create a library of standard templates, defined content lifecycles and publication workflows. 2. Create repeatable, documented processes for content creation and approval within divisions and courts. 3. Demonstrate streamlined and simplified methods for expanding and/or adding new section content areas of the Web site. 4. Expand the number of groups empowered to generally publish content to the production environment from one (1) to a minimum of four (4) within six months of deployment. 5. Demonstrate a reduction in the number of steps required to publish a new section to the Website.
Support implementation of the site redesign leveraging the RedDot technology platform	<ul style="list-style-type: none"> 6. Demonstrate, via usability testing, effective realization of the design templates, information architecture and use cases delivered to the AOC by the redesign contractor.

Goals	Measurable Objectives
Institutionalize a “citizen/user-centric” approach to Web content design and development, based on Web analytics, use cases, and personas	<ul style="list-style-type: none">7. Demonstrate and document an increase in the number of task-oriented processes supported by the judicial branch Web sites.8. Demonstrate and document a reduction in steps to complete functions within the site as defined in critical path use cases.
Enable more timely posting and/or removal of Web content	<ul style="list-style-type: none">9. Demonstrate a reduction in the amount of obsolete content found on the site.10. Implement processes to alert content owners of content expiration and require action to update, archive or delete outdated content.

End of Section 5.0

6.0 Overview of AOC-Maintained Web Sites

- 6.1 The following Web sites, currently maintained by the AOC, were included in the redesign and are in scope for the Web Redesign Implementation and Migration project:
- 6.2 **Public-Facing:**
- 6.3 **California Courts Web Site** (<http://www.courtinfo.ca.gov>).
The California Courts Web site also includes:
 - 6.3.1.1 **California Supreme Court and Courts of Appeal**
(<http://www.courtinfo.ca.gov/courts/>)
 - 6.3.1.2 **California Online Self Help Center**
(<http://www.courtinfo.ca.gov/selfhelp>)
 - 6.3.1.3 **Center for Children, Families & the Court (CFCC)**
(<http://www.courtinfo.ca.gov/programs/cfcc/>)
- 6.4 **Internal-Facing:**
 - 6.4.1 **Serranus Extranet**
Password-protected Extranet, providing information and resources pertaining to court administration. The site is used by judges, court executive officers, court professionals, and AOC staff to share information regarding policies, programs, news, and other court-related initiatives.
 - 6.4.2 **Education Portal**
Includes educational materials, course calendars, and online learning curricula. The site also includes a sub-site:
 - 6.4.2.1 **COMET** (*Court Online Mentoring, Education, and Training*) delivers online learning, video, and MOODLE courses.
 - 6.4.3 **Miscellaneous Web Sites**
A collection of additional small sites that serve justice partners and clients who exchange court-related information with selected audiences. The content of these sites is not geared to the public, but to specific niche audiences that do not have access to the Serranus Extranet. These sites are housed on a www2 server.
- 6.5 **Content Estimates for Migration**
 - 6.5.1 Total current content is estimated at 16 GB.
 - 6.5.2 The following table contains rough estimates for file types delivered by each of the current Web sites in scope for implementation and

migration. The AOC anticipates a 10-15% reduction in the number of files documented below following completion of an internal content clean-up initiative, currently underway.

<u>Site</u>	<u>Rough Numbers of Files</u>
California Courts Web Site www.courtinfo.ca.gov	HTML: 5,731 Graphics: 3,247 DOC: 29,530 PDF: 38,337 XLS: 130
<u>Serranus Extranet</u>	HTML: 3,158 Graphics: 1,166 DOC: 2,155 PDF: 9,508 XLS: 426
<u>Education Portal</u>	HTML: 579 Graphics: 1,248 DOC: 25 PDF: 357 XLS: 1
Miscellaneous Web sites	HTML: 8,121 Graphics: 6,024 DOC: 1,352 PDF: 1,918 XLS: 316

6.6 Future State of AOC-Maintained Web Sites

- 6.6.1 All AOC sites will be consolidated into a single site with a shared architecture, visual design, templates, and navigation.
- 6.6.2 The success of the redesign will depend on a complex, roles-based content delivery model, leveraging a secure environment for branch (internal) users.
- 6.6.3 The following screen shots (Figures 1 and 2) provide sample wireframes indicating the direction of the redesigned site.

The mockups reflect the following details of the redesign:

- The aggregation of all the AOC sites into a single site.
- Tabbed navigation to separate main sections,
- An authenticated user state (Figure 2) that segments and displays content according to assigned roles and
- Content modules that may be reused throughout the site.

Figure 1:

Figure 1 represents the public state of the redesigned site. No password required.

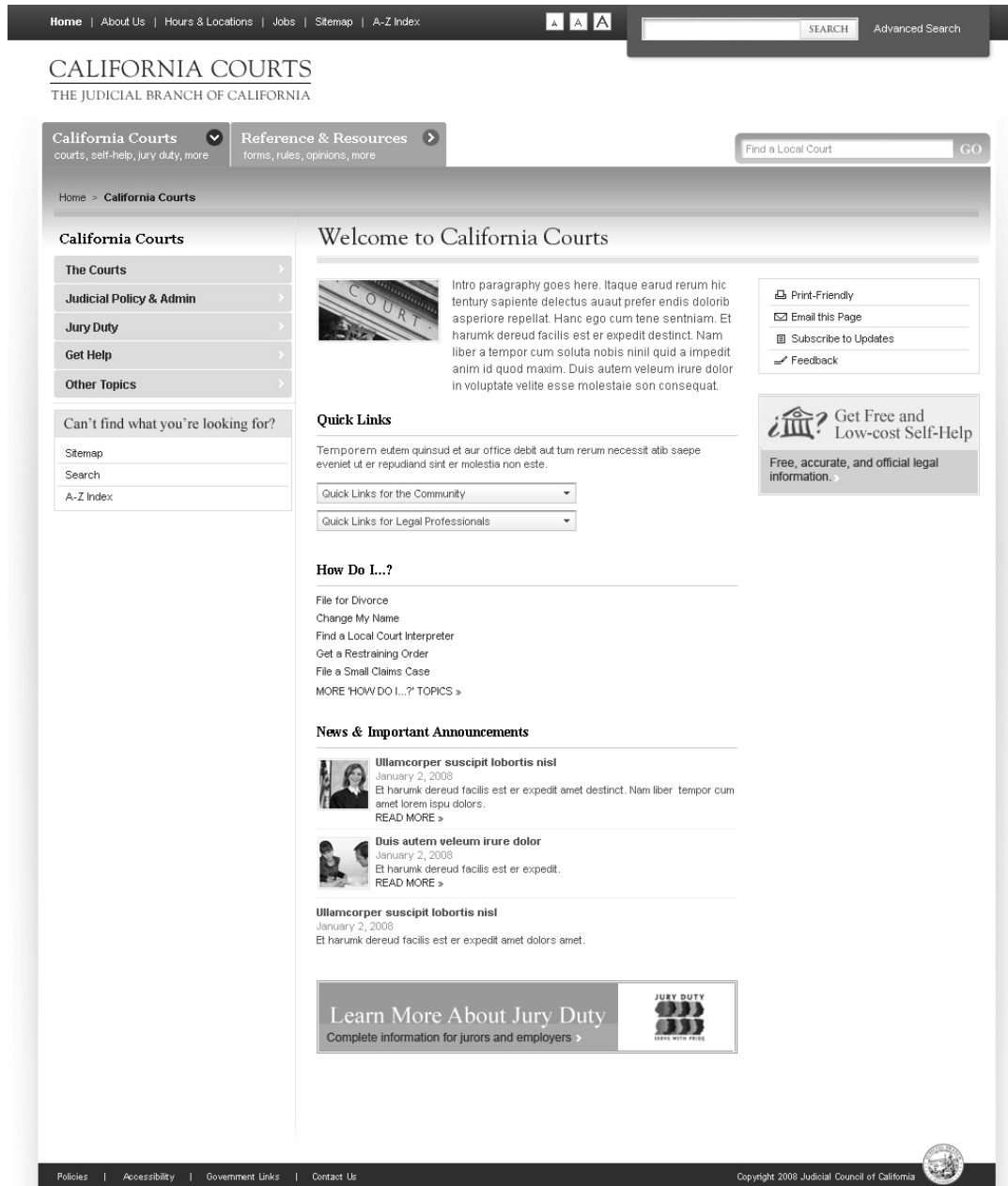


Figure 2:

Figure 2 represents the secure (logged-in) state of the redesigned site. Password/authentication is required. Note how logged users share elements common to the public view. However, additional content will be presented to logged-in users.



End of Section 6.0

7.0 RFP Response Process and Instructions

7.1 The following describes the process and requirements that the vendor shall follow throughout the RFP response process.

7.2 Point of Contact

7.2.1 All communication with the AOC must be in writing and must be directed to the AOC single Point of Contact (POC) for this RFP at the following email address:

solicitations@jud.ca.gov

7.2.2 No Vendor contact with any Court organization is permitted.

7.3 RFP Process Timetable

The RFP response process and estimated timetable is as follows.

No.	Key Event	Key Date
1	AOC issues RFP	December 10, 2008
2	Deadline for proposers to submit questions, requests for clarifications or modifications to solicitations@jud.ca.gov	1:00 pm (Pacific Time) December 18, 2008
3	Answers to questions posted on the California Courts Website	December 22, 2008 (estimated)
4	Proposal due date and time	3:00 pm (Pacific Time) January 15, 2009
5	Invitations for Finalists' Presentations and Interviews (if held)	January 23, 2009 (estimated)
6	Finalist Presentations and Interviews (if held)	January 27 - 28, 2009 (estimated)
7	Notice of intent to award	February 4, 2009 (estimated)
8	Completed negotiation and execution of contract	February 13, 2009 (estimated)
9	Project commences	February 16, 2009 (estimated)
10	Project completes	September, 2009 (estimated)

8.0 RFP Package Clarification or Additional Information

8.1 Request for Clarifications or Modifications

- 8.1.1 Vendors interested in responding to the solicitation may submit questions by e-mail only on procedural matters related to the RFP or requests for clarification or modification of this solicitation document, including questions regarding Attachment 2, Minimum Contract Terms, to the Solicitations mailbox referenced below. If the vendor is requesting a change, the request must state the recommended change and the proposer's reasons for proposing the change.

Solicitations mailbox: solicitations@jud.ca.gov

- 8.1.2 All questions and requests must be submitted by e-mail to the Solicitations mailbox and received no later than the date and time specified in Section 7.3. Questions or requests submitted after the due date will not be answered.
- 8.1.3 All e-mail submissions sent to the Solicitations mailbox MUST contain the RFP number and other appropriate identifying information in the e-mail subject line. In the body of the e-mail message, always include paragraph numbers whenever references are made to content of this RFP. Failure to include the RFP number as well as other sufficient identifying information in the e-mail subject line may result in the AOC's taking no action on a proposer's e-mail submission.
- 8.1.4 Without disclosing the source of the question or request, the AOC Contracting Officer will post a copy of both the questions and the AOC's responses on the California Courts Web site. The AOC reserves the right to edit questions for clarity and relevance. The AOC, at its discretion, may elect not to address some questions.
- 8.1.5 If a proposer's question relates to a proprietary aspect of its proposal and the Vendor believes that the question would expose proprietary information if disclosed to competitors, the vendor may submit the question in writing, conspicuously marking it as "CONFIDENTIAL." With the question, the vendor must submit a statement explaining why the question is sensitive. If the AOC concurs that the disclosure of the question or answer would expose proprietary information, the question will be answered, and both the question and answer will be kept in confidence. If the AOC does not concur regarding the proprietary nature of the question, the question will not be answered in this manner and the vendor will be so notified, at which time the vendor

may withdraw the question or restate the question in order to make it non-proprietary or non-confidential.

8.2 Ambiguity, Discrepancies, Omissions

- 8.2.1 If a vendor submitting a proposal discovers any ambiguity, conflict, discrepancy, omission, or other error in this RFP package, the vendor shall immediately provide the AOC with written notice of the problem to the POC and request that the RFP be clarified or modified. Without disclosing the source of the request, the AOC may modify the RFP package prior to the proposal due date by posting the addendum to the California Courts Web site.
- 8.2.2 If prior to the date fixed for submission of proposals a vendor submitting a proposal knows of or should have known of an error in the RFP package but fails to notify the AOC of the error, the vendor shall propose at its own risk. If the Vendor is awarded the contract, the vendor shall not be entitled to additional compensation or time because of the error or its later correction.

8.3 RFP Addenda

- 8.3.1 The AOC may modify the RFP document through RFP addenda. If any Vendor determines that an addendum unnecessarily restricts its ability to provide a proposal, it must notify the POC no later than one day following the posting of the addendum.
- 8.3.2 The AOC will post RFP addenda to the AOC Website. It is the Vendor's responsibility to check the AOC Website for RFP addenda or other communications. The AOC recommends vendors check the Website on a daily basis at a minimum.

End of Section 8.0

9.0 Submission Guidelines

- 9.1 Proposers will submit one (1) signed original and three (3) copies of the consulting proposal signed by an authorized representative of the company, including name, title, address, email address, and telephone number of one (1) individual who is the responder's designated representative.
- 9.2 Proposers will submit one (1) original and three (3) copies of the cost proposal in a separate envelope. The cost proposal must be presented in the format provided in Attachment 6 of this RFP. Detailed costs must be provided and submitted on CD-ROM in MS Excel format. The AOC reserves the right to contact proposers on cost and scope clarification at any time throughout the selection process and negotiation process. Finally, it is important that proposers use the cost format presented in this RFP and not their own format. Please do not use "TBD" (to be determined) or similar annotations in the cells for cost estimates. Significant assumptions should be identified and elaborated.
- 9.3 Proposals must be delivered to the individual listed under Submission of Proposals, as set forth on the cover memo of this RFP by the proposal due date and time. Only written responses will be accepted. Responses should be sent by registered or certified mail or by hand delivery.
- 9.4 In addition to submittal of the originals and copies of the proposals, as set forth in Section 9.0, proposers are also required to submit an electronic version of the entire proposal, including requested samples and financial information, on CD-ROM. If financial information cannot be provided in an electronic format, hard copy submittal will be accepted.
- 9.5 Proposals should be prepared as simply as possible and provide a straightforward, concise description of the proposer's capabilities to satisfy the requirements of the RFP. Expensive bindings, color displays, and the like are not necessary. Emphasis should be placed on conformity to the state's instructions, requirements of this RFP, and completeness and clarity of content. All parts, pages, figures, and tables must be numbered and clearly labeled.

End of Section 9.0

10.0 Specifics of a Responsive Proposal

Furnishing all information is mandatory. Failure to provide this information will delay or may even prevent completion of the action for which this information is sought.

The proposal must include the following major sections:

10.1 Title Page

10.2 **Letter of Transmittal.** The proposer must prepare a cover letter on the prime proposer's business letterhead to accompany the proposal. The purpose of this letter is to transmit the proposal, and therefore should be brief. The letter must be signed by an individual who is authorized to bind his or her firm to all statements, including services and prices, contained in the proposal. The cover letter must state who the proposed prime contractor is, and name(s) of any participating vendors.

10.3 Table of Contents

10.4 **Executive Summary.** Limit this RFP section to a brief narrative highlighting the proposer's proposal. The summary should contain as little technical jargon as possible and should be oriented toward non-technical personnel. This section should not include cost quotations. Please note that the executive summary must identify the primary engagement contact for the consulting Vendor, including a valid e-mail address, telephone and fax numbers.

10.5 **Scope of Services.** In this section, include a general discussion of the proposer's understanding of the "overall" project and the scope of work proposed.

10.6 Company /Team Background and Resource Capabilities

Include a narrative description of the company, the company's place in the marketplace and strengths and weaknesses of the proposed implementation methodology and consulting team. If multiple firms are represented in the proposal, this section needs to include this information for each firm. Include here, the provided Vendor Certification Form, Attachment 8, on behalf of each firm represented in the proposal. The AOC needs to evaluate the Vendors' stability and ability to support the commitments set forth in response to the RFP. The AOC, at its option, may require a Vendor to provide additional support and/or clarify requested information. The AOC will conduct typical business reference checks on all of the vendors participating in

the proposal process. Vendors must provide the following information about the company or companies included in the proposed solution. The vendor(s) must outline the company's background, including:

- The tax ID number of the proposed prime and sub-contractors (provide via Attachment 4, Payee Data Record Form).
- How long the company has been in business.
- A brief description of the company size and organizational structure.
- If applicable, how long the company has been providing consulting services to public sector clients.
- In the case of partnered or combined responses, the nature of the relationship among the parties must be described. Include whether the parties collaborated previously and the intended relationship and reporting structure for the proposed project.

10.7 Content Management System Experience

The vendor must provide a description of the team's overall experience implementing content management systems. If the vendor team has experience with RedDot CMS, please detail this experience. Additionally, vendors should outline experience with the RedDot LiveServer solution or other technologies used to drive dynamic site content.

10.8 Implementation Methodology

The vendor must provide an overview of their implementation methodology. This section should include a description of the vendor's approach to successful implementation of Web projects and provide some context for the detailed markup of the Statement of Work. This section should include best practices, management methodology, and any other information that will help the AOC to understand the vendor's unique capabilities or qualifications.

10.9 Large-Scale Content Migration Experience

The vendor must provide an overview of their experience in large-scale content migration efforts. The vendor must provide specific examples of past projects, detailing migration process and methodology used to successfully migrate content from a legacy to a content management system enabled environment. This section should include a detailed discussion of manual or automated methods used by the vendor to manage the migration process, time required for content migration, staffing recommendations and possible recommendations to the AOC based on data provided in this RFP (See Section 6.4 for number of files anticipated for the migration effort).

10.10 Statement of Work

The AOC has provided a draft Statement of Work (SOW), Attachment 5. **The vendor must provide a markup/redline reflective of any changes to the SOW as part of their proposal.**

The vendor is welcome to suggest changes to the draft SOW document based on their past experience implementing content management systems and redesigned Web sites. These may include changes to deliverables and phases, so long as the changes are reflected in all aspects of the vendor's proposal.

10.11 Draft Project Plan

The Vendor must provide a draft project plan. The project plan must demonstrate completion of all project tasks detailed in the Statement of Work by the AOC's stated September 2009 launch date. The draft project plan should also provide insight into consulting estimates provided in the Cost Proposal.

10.12 Personnel

In an attempt to maintain some consistency in proposals for evaluation purposes, the AOC has identified four consulting roles for the project. Proposed Roles:

Description	Role	Responsibilities
Project or Account Manager	A Vendor Project or Account Manager will be assigned to manage, in conjunction with the AOC Project Manager, all areas of the consulting engagement including adherence to project schedules, task assignments, and budgets. This person will serve as the first line management representative for all matters related to vendor consulting engagement responsibilities. The Vendor Project Manager will also verify and confirm project task Deliverables with the AOC Project Manager.	The Vendor Project or Account Manager will work with the AOC as a member of the Project Management Team to develop and control all aspects of Vendor's consulting engagement, including adherence to consulting engagement schedules, task assignments and budgets. The Manager will verify and confirm project task Deliverables with the AOC Project Manager and maintain ongoing communication regarding project status with the AOC and vendor management teams.

Solution Architect	The Solution Architect(s) will be tasked with the review of AOC's Web design, fit gap analysis against the RedDot solution, and definition of the final solution requirements. These individuals will be the subject matter experts and solution leads from the vendor team. They will be the focal point for all solution knowledge transfer to the AOC group during the course of the engagement.	The Solution Architect(s) will be ultimately responsible for design of the RedDot enabled Website.
Solution Developer	The Solution Developer will perform configuration and development of the RedDot application and testing of the configured application against documented design criteria.	The Solution Developer is responsible for tailoring the RedDot application to meet the AOC's documented requirements as defined in the solution design documents.
Content Migrator	The Content Migrator will perform activities related to content migration and import.	According to processes designed by the analysts, content migrators will move content into the new site/RedDot solution via automated and/or manual means, perform quality assurance on migrated content and add metadata following prescribed rules.

10.12.1 Provide resumes for each of the above proposed staff members. Indicate each individual's tenure with the vendor, number of projects delivered in similar size and complexity to the scope of this RFP, a brief summary of each project, and any specific experience in the public or government sectors. If the individual is a subcontractor, briefly describe the relationship and reporting structure for this role.

10.12.2 Vendor personnel shall be available as required for on-site meetings and project activities. Although vendor staff may not be required to work on site full-time, they will need to have flexible schedules to accommodate AOC staff availability, particularly during system design and content processing activities.

10.12.3 Other Consulting Staff

The proposer is invited to present additional staff in their proposal to represent their best team to support successful delivery of the Deliverables outlined in Attachment 5, Statement of Work.

10.13 Offshoring

10.13.1 The vendor must describe with specificity what services, if any, will be performed offshore. For purposes of this section, a service is offshored if it is performed in whole or in part outside of the political boundaries of the United States of America and its territories. The vendor must also specify (i) by what amount, if any, the cost proposal may be affected if offshoring is not approved, (ii) whether there are qualified vendors onshore to perform the services proposed to be offshored.

10.13.2 For each service offshored, the vendor must provide the following information:

10.13.2.1 Who will perform the services, the relationship of the service provider to the vendor, and background information sufficient to enable the AOC to evaluate the service provider's stability, competence and trustworthiness;

10.13.2.2 Where the services will be performed and the extent to which the laws of that political jurisdiction give the vendor, any subcontractor, the AOC, and individuals rights to recover for damages and to obtain injunctive relief for breaches of privacy rights as to personal, confidential and sensitive information;

10.13.2.3 What steps the vendor will take to ensure that personal, confidential and sensitive information will be used only for performing the services, and will otherwise be protected from disclosure to third parties, including physical and logical security, encryption, etc.;

10.13.2.4 Whether the vendor will warrant the quality and timeliness of the services, and what exceptions or limitations, if any, the vendor will seek to impose;

10.13.2.5 Whether the vendor will indemnify and defend judicial branch entities and judicial branch personnel from losses, costs, and expenses that arise out of offshoring the services, and what exceptions or limitations, if any, the vendor will seek to impose;

10.13.2.6 Describe how the vendor's insurance covers services that are offshored, and describe any insurance coverage differences between proposed offshore services vendor's other proposed services.

10.14 Resource Allocation

10.14.1 Do you have dedicated resources or shared resources on projects? If shared, how are your projects prioritized to minimize impact on timelines and deliverables?

10.15 Customer References

10.15.1 The AOC considers references an important part of the process in awarding a contract and will be contacting references as part of this selection. Vendors are required to provide the AOC with reference information as part of their proposals using the reference form included in this RFP (Attachment 7). Vendors must provide at least three (3) client references for consulting services that are similar in size and complexity to this procurement and have, preferably, included implementation of the RedDot or other Web content management solution. Please inform references that they will be contacted by the AOC.

10.15.2 The AOC will not call vendors to tell them that their references will be contacted because all references provided will be contacted by the AOC during the selection process. Similarly, AOC will not work through a proposer's Reference Manager to complete a reference. The names and phone numbers of the project manager/customer contact must be listed. Failure to provide this information may result in the vendor not being elevated to the Finalist Presentation.

10.16 Cost Proposal

10.16.1 Submit cost proposal separately from the rest of the technical proposal and in sealed envelope(s).

10.16.2 Note that, in an effort to maximize the investment of dollars for this initiative, the AOC is not budgeted to fund consultant travel. The AOC will not provide travel reimbursements to consultants as part of this project. The blended rates proposed in the vendor's Cost

Proposal shall be inclusive of any and all anticipated or actual travel, lodging, meals, and transportation expenses.

- 10.16.3 Use Attachment 6, Cost Proposal, to propose all costs, fees, expenses, and pricing for this project.

10.17 Exceptions to the RFP

- 10.17.1 Exceptions shall be clearly identified in this section and written explanation shall include the scope of the exceptions, the ramifications of the exceptions for the AOC, and the description of the advantages or disadvantages to the AOC as a result of exceptions. The AOC, in its sole discretion, may reject any exceptions within the proposal.
- 10.17.2 Submit Attachment 3, vendor's Acceptance of the RFP's Minimum Contract Terms and the proposer's markup of Attachment 2, Minimum Contract Terms, if applicable, as part of this section.

End of Section 10.0

11.0 Evaluation Process

11.1 Written Proposal Review

11.1.1 The written review will begin with a check for the responsiveness of a proposal to the RFP requirements outlined in Section 10.0, Specifics of a Responsive Proposal. A proposal can be eliminated if it does not contain all proposal elements outlined in Section 10.0.

11.2 Finalist Selection

11.2.1 The selection team will compile scores for each vendor based on evaluation criteria outlined in section 12.0 of this document. The vendors with the highest ranking scores for each of the individual projects will be identified and may be invited to participate in interviews, if interviews are deemed necessary by the selection team.

11.2.2 In the event the selection team determines that interviews are not necessary, the AOC will proceed with selection of the preferred provider(s) as specified in Section 11.4, below.

11.3 Finalist Presentations (if held)

11.3.1 Following selection team approval, the highest ranked proposers (hereinafter "finalists") will be invited to present their proposals and be interviewed by the selection team.

11.3.2 The written proposals will be used as a reference point when scoring finalists.

11.3.2.1 Finalist Presentation and Staff Interviews

Finalists will be invited to present their proposal to the AOC selection team. The presentation shall conform to the following general guidelines:

- 11.3.2.1.1 Introductions (10 minutes)
- 11.3.2.1.2 Company Overview/Orientation (10 minutes)
- 11.3.2.1.3 Presentation of Proposal (60 minutes)
- 11.3.2.1.4 Break* (15 minutes)
- 11.3.2.1.5 Staff Interviews (60 minutes)
- 11.3.2.1.6 Wrap-Up (15 minutes)

*Note that the AOC selection team will not be available to interact with proposer representatives during breaks.

- 11.3.2.2 Finalist Presentations and staff interviews will take place per dates outlined in the RFP Process Table (Section 7.3).
- 11.3.2.3 Finalists will be informed of possible dates for their Finalist Presentation and interviews upon invitation to present.

11.4 Selection Team Finalist Review

- 11.4.1 Following completion of all Finalist Presentations and staff interviews, if held, the selection team will determine scores for each vendor finalist and present these scores to the project sponsors.
- 11.4.2 The top vendors (e.g. one (1) leader and one (1) runner up) from the finalist group will be identified and recommended for consideration by the project sponsors.

11.5 Project Sponsor Finalist Review

- 11.5.1 The top vendors will be presented to the project sponsors. Ultimately, the decision to move forward with contract negotiations will be decided in this forum.

End of Section 11.0

12.0 Selection Criteria and Ratings

- 12.1 Proposals that contain false or misleading statements may be rejected if, in the opinion of the AOC, the information was intended to mislead the state regarding a requirement of the solicitation document.
- 12.2 If a proposal fails to meet a material solicitation document requirement, the proposal may be rejected. A deviation is material to the extent that a response is not in substantial accord with solicitation document requirements. Material deviations cannot be waived. Immaterial deviations may cause a proposal to be rejected.
- 12.3 During the evaluation process, the AOC may require a proposer's representative to answer questions with regard to the proposer's proposal. Failure of a vendor to respond and demonstrate in a timely manner that the claims made in its proposal are in fact true may be sufficient cause for deeming a proposal non-responsive.
- 12.4 Written Proposal Evaluation
 - 12.4.1 A vendor is eligible for a total of 100 points.
 - 12.4.2 Proposals will be evaluated by the AOC per the following selection criteria and weighting:

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Criteria	Description	Total Possible Points	Specific Areas of Merit and Corresponding RFP Sections
Experience on similar, large-scale WCMS Implementation and Migration projects	The selected vendor will have a strong record of accomplishment implementing and migrating Website designs onto a content management platform. The selected vendor will also demonstrate past success in developing large-scale content migration initiatives, from pre-planning, to execution and final validation. Previous experience with public sector or government agencies.	35	<p>Detail and specificity of proposed implementation and migration methodology 10.6, Company/Team Background and Resource capabilities and 10.8, Implementation Methodology (10 points)</p> <p>10.9, Large-Scale Content Migration Experience (10 points)</p> <p>Demonstrated areas of past success 10.15, Customer References (5 points)</p> <p>Past working experience with Content Management Systems, RedDot preferred 10.7, Content Management System Experience (10 points)</p>

Criteria	Description	Total Possible Points	Specific Areas of Merit and Corresponding RFP Sections
Strength of Work Plan	Using the draft Statement of Work document provided in Attachment 5, the Vendor will submit a clear, articulate work plan that addresses each project deliverable, objective and stated timeframe.	15	Completeness, detail and specificity of work plan 10.5, Scope of Services and 10.10, Statement of Work (10 points)
Reasonableness of cost projections and markup of the Minimum Terms and Conditions	The selected vendor will submit a competitive cost proposal that is favorable to public sector/non-profit organizations such as the Judicial Branch of California. The proposal must represent the Vendor's best and final offer. Additionally, the selected vendor will submit reasonable edits to the draft Terms and Conditions.	20	Reasonableness of cost proposal 10.16, Cost Proposal (15 points) Reasonable edits of draft Terms and Conditions 10.17, Exceptions to the RFP (5 points)
Credentials of staff to be assigned to the project	The selected vendor will submit staff resumes outlining the credentials and accomplishments of those staff proposed for completion of project deliverables	15	Applicability of past experience as stated on staff resumes, as well as depth of knowledge and experience in CMS/Red Dot Implementations 10.12, Personnel and 10.13, Offshoring (15 points)

Criteria	Description	Total Possible Points	Specific Areas of Merit and Corresponding RFP Sections
Ability to meet timing requirements to complete the project	The selected vendor will submit a draft project plan inclusive of all project phases, deliverables and milestones presented in the Statement of Work. The draft project plan must present a timeline which targets a launch date of September, 2009.	15	Reasonableness and completeness of proposed timeline 10.11, Draft Project Plan and 10.14, Resource Allocation (15 points) .

12.5 **Finalist Evaluation.** Finalists will be evaluated by the AOC per same criteria as the written proposals. The Vendor's proposal score will be refined during finalist evaluation to achieve their final score.

End of Section 12.0

13.0 RFP Attachments

- 13.1 Attachment 1, Administrative Rules Governing Request for Proposals. Proposers shall follow the rules, set forth in Attachment 1, in preparation of their proposals.
- 13.2 Attachment 2, Minimum Contract Terms. Contracts with successful firms will be signed by the parties on a Judicial Council of California, Administrative Office of the Courts Standard Agreement form and will include terms appropriate for this project. Terms and conditions typical for the requested services are attached as Attachment 2.
- 13.3 Attachment 3, Vendor's Acceptance of the RFP's Minimum Contract Terms. Proposers must either indicate acceptance of the Minimum Contract Terms, as set forth in Attachment 2, or **clearly identify** exceptions to the Minimum Contract Terms, as set forth in Attachment 2. If exceptions are identified, then proposers must also submit (i) a red-lined version of Attachment 2 that clearly tracks proposed changes to the attachment, and (ii) written summary of each change and relevance and rationale to substantiate each proposed change
- 13.4 Attachment 4, Payee Data Record Form. The AOC is required to obtain and keep on file a completed Payee Data Record for each vendor prior to entering into a contract with that vendor. Therefore, proposer's proposal must include a completed and signed Payee Data Record Form, set forth as Attachment 4.
- 13.5 Attachment 5, Statement of Work. The proposer **must provide** a markup/redline reflective of any changes to the SOW as part of their proposal.
- 13.6 Attachment 6, Cost Proposal. Proposers must propose all pricing necessary to accomplish the work requirements of the eventual contract. **It is expected that all proposers responding to this RFP will offer the proposer's government or comparable favorable rates and will be inclusive of all pricing necessary to provide the contracted work.**
- 13.7 Attachment 7, Customer Reference Form. References supplied per section 9.15 must be provided using the form attached as Attachment 7.
- 13.8 Attachment 8, Vendor Certification Form, certifying neither proposer nor any proposed subcontractors are currently under suspension or debarment by any state or federal government agency, and that neither proposer nor any proposed subcontractors are tax delinquent with the State of California.
- 13.9 Attachment 9, DVBE Participation Form

13.10 Attachment 10, Checklist for RFP Completeness. This checklist is provided to assist the vendor in assuring the completeness of the Proposal prior to submission to the AOC. *This document is for reference only* and does not need to be included in the proposal.

End of Section 13.0

14.0 Rights

- 14.1 The AOC reserves the right to reject any and all proposals, in whole or in part, as well as the right to issue similar RFPs in the future.
- 14.2 This RFP is in no way an agreement, obligation, or contract and in no way is the AOC or the State of California responsible for the cost of preparing the proposal. One (1) copy of a submitted proposal will be retained for official files and becomes a public record.

End of Section 14.0

15.0 Additional Requirements

- 15.1 It may be necessary to interview prospective service providers to clarify aspects of their submittal. If conducted, interviews will likely be conducted by telephone conference call. The AOC will notify prospective service providers regarding the interview arrangements.
- 15.2 It may also be necessary for the AOC to request additional documentation or information in order to clarify aspects of a proposal or a vendor's ability to perform the required services. Should the AOC request such documentation or information, proposer shall provide the requested documentation or information no later than the date specified by such request.
- 15.3 The AOC reserves the right, at any time during the solicitation process, to require proposers, and their named subcontractors, to provide an audited or reviewed profit and loss statement and balance sheet, in accordance with reporting requirement of the American Institute of Certified Public Accountants (AICPA), for the last three (3) years.

- 15.3.1 The AOC may also require:

- 15.3.1.1 a statement of any bankruptcies filed by the proposer and any law suits filed against the proposer for malfeasance and a detailed listing of the adverse action, cause, number, jurisdiction in which filed and current status; and,

- 15.3.1.2 disclosure of any judgments, pending litigation, known or planned sale, merger or acquisition of vendors' company/ies or other real or potential financial reversals that might materially affect the viability of the vendor(s) organization or public safety products, or the warranty that no such condition is known to exist.

- 15.3.2 In the event the AOC requires proposers to provide an audited or reviewed profit and loss statement and balance sheet, the State of California Information Practices Act of 1977 requires the AOC to notify all vendors of the following:

The principal purpose for requesting the above information about your company is to provide financial information to determine financial qualification. State policy and state and federal statutes authorize maintenance of this information.

- 15.4 Failure of a proposer to participate in an interview, or provide requested documentation or information by the AOC's specified date may result in the vendor's proposal being disqualified for further evaluation.

End of Section 15.0

16.0 Disabled Veteran Business Enterprise Participation Goals

- 16.1 The State of California executive branch requires contract participation goals of a minimum of 3 percent for disabled veteran business enterprises (DVBEs). As a policy, the AOC follows the intent of the executive branch program. Therefore, a proposer's response should demonstrate DVBE compliance; otherwise, if it is impossible for proposer's company to comply, they should explain why and should demonstrate written evidence of a "good faith effort" to achieve participation. Proposers must complete the DVBE Compliance form and include the form with the Fee Proposal. If proposer has any questions regarding the form, applicant should submit its question to the Solicitations mailbox: solicitations@jud.ca.gov. For further information regarding DVBE resources, please contact the Office of Small Business and DVBE Certification, at 916-375-4940, or access DVBE information on the executive branch's Web site at: <http://www.dgs.ca.gov/default.htm>.

End of Section 16.0

17.0 Confidential or Proprietary Information

- 17.1 The Administrative Office of the Courts policy is to follow the intent of the California Public Records Act (PRA). If a proposer's proposal contains material noted or marked as confidential and/or proprietary that, in the sole opinion of the AOC, meets the disclosure exemption requirements of the PRA, then that information will not be disclosed pursuant to a request for public documents. If the AOC does not consider such material to be exempt from disclosure under the PRA, the material will be made available to the public, regardless of the notation or markings. If a vendor is unsure if its confidential and/or proprietary material meets the disclosure exemption requirements of the PRA, then it should not include such information in its proposal.
- 17.2 If any information submitted in a proposer's proposal is confidential or proprietary, the vendor must provide that information on pages separate from non-confidential information and clearly label the pages containing confidential information "CONFIDENTIAL."
- 17.3 In addition to labeling each confidential page, the vendor must include the following statement on a separate page, indicating all page numbers that contain confidential or proprietary information:
- The information contained on pages _____ shall not be duplicated or used in whole or in part for any other purpose than to evaluate the proposal; provided that if a contract is awarded as a result of this proposal, the AOC shall have the right to duplicate, use, or disclose this information to the extent provided in the contract. This restriction does not limit the right of the AOC to use the information contained herein if obtained from another source.*
- 17.4 PROPOSALS WILL BE MAINTAINED IN CONFIDENCE BY THE AOC UNTIL ISSUANCE OF A NOTICE OF INTENT TO AWARD. UPON ISSUANCE OF A NOTICE OF INTENT TO AWARD, ALL PROPOSALS, INCLUDING PROPOSAL INFORMATION LABELED AS CONFIDENTIAL BY A VENDOR, WILL BECOME PART OF THE PUBLIC RECORD AND SUBJECT TO DISCLOSURE UNDER THE CALIFORNIA PUBLIC RECORDS ACT, EXCEPT TO THE EXTENT INFORMATION IS PROTECTED FROM DISCLOSURE BY LAW.

End of Section 17.0

END OF BASE RFP